

Personalizing the Distribution Line – Invoice Information Page Overview

Cardinal allows users to change the order the fields display on the **Invoice Information Page Distribution Line**. This allows you to set up the order of the ChartFields in the way that works best for how you enter vouchers for your agency.

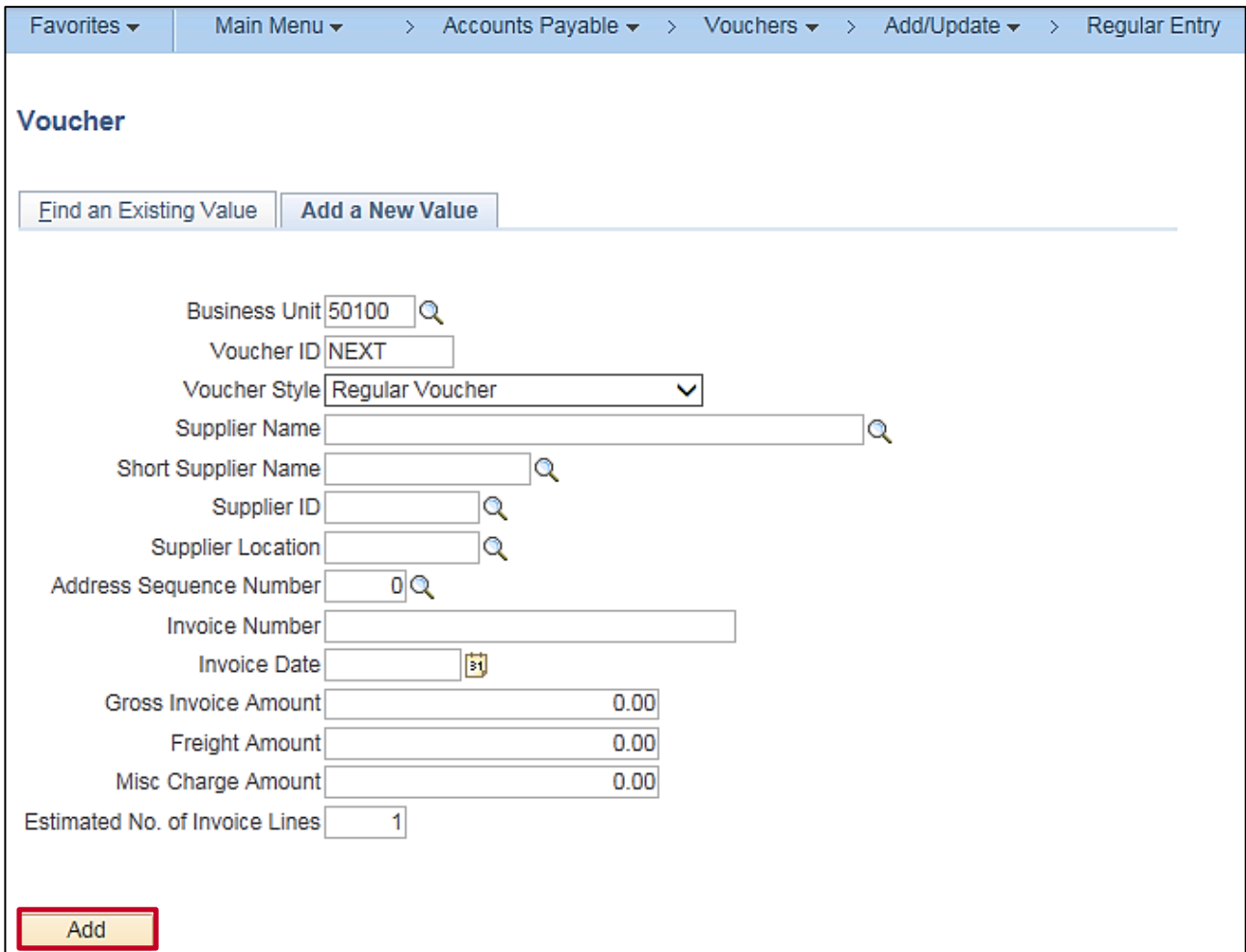
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Personalizing the Distribution Line – Invoice Information Page

1. Navigate to the **Voucher** search page using the following path:

Main Menu > Accounts Payable > Vouchers > Add/Update > Regular Entry



Voucher

Find an Existing Value Add a New Value

Business Unit 50100

Voucher ID NEXT

Voucher Style Regular Voucher

Supplier Name

Short Supplier Name

Supplier ID

Supplier Location

Address Sequence Number 0

Invoice Number

Invoice Date 31

Gross Invoice Amount 0.00

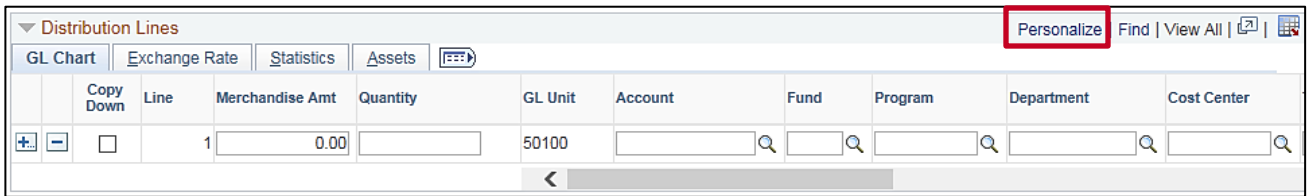
Freight Amount 0.00

Misc Charge Amount 0.00

Estimated No. of Invoice Lines 1

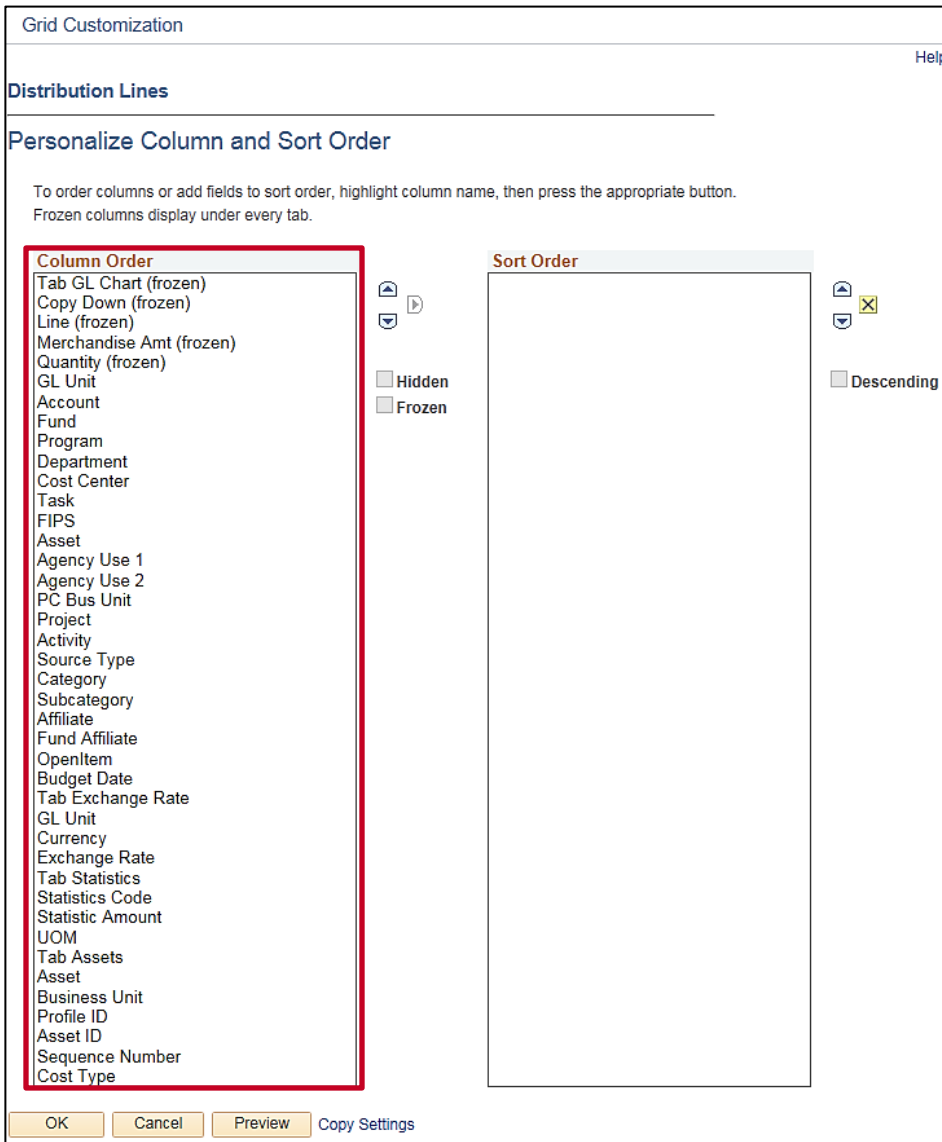
Add

2. The **Voucher** search page displays.
3. Click the **Add** button to access the **Invoice Information** page.



The screenshot shows the 'Distribution Lines' section of the SW AP312 system. At the top, there are tabs for 'GL Chart', 'Exchange Rate', 'Statistics', and 'Assets'. The 'Personalize' link is highlighted with a red box. Below the tabs is a table with columns: 'Copy Down', 'Line', 'Merchandise Amt', 'Quantity', 'GL Unit', 'Account', 'Fund', 'Program', 'Department', and 'Cost Center'. The first row shows '1' in the 'Line' column, '0.00' in the 'Merchandise Amt' column, and '50100' in the 'GL Unit' column. Search icons are present for the 'Account', 'Fund', 'Program', 'Department', and 'Cost Center' columns.

- In the **Distribution Lines** section of the page, click the **Personalize** link.



The screenshot shows the 'Grid Customization' pop-up window. The 'Distribution Lines' section is selected. The 'Personalize Column and Sort Order' section is active. Below this, there is a list of columns to be customized. The 'Column Order' list is highlighted with a red box. The 'Sort Order' list is empty. The 'Hidden' and 'Frozen' checkboxes are unchecked. The 'Descending' checkbox is checked. The 'Column Order' list includes: Tab GL Chart (frozen), Copy Down (frozen), Line (frozen), Merchandise Amt (frozen), Quantity (frozen), GL Unit, Account, Fund, Program, Department, Cost Center, Task, FIPS, Asset, Agency Use 1, Agency Use 2, PC Bus Unit, Project, Activity, Source Type, Category, Subcategory, Affiliate, Fund Affiliate, OpenItem, Budget Date, Tab Exchange Rate, GL Unit, Currency, Exchange Rate, Tab Statistics, Statistics Code, Statistic Amount, UOM, Tab Assets, Asset, Business Unit, Profile ID, Asset ID, Sequence Number, and Cost Type. The 'Sort Order' list is empty. The 'Hidden' and 'Frozen' checkboxes are unchecked. The 'Descending' checkbox is checked. At the bottom, there are buttons for 'OK', 'Cancel', 'Preview', and 'Copy Settings'.







- The **Grid Customization** pop-up window displays. To change the order the fields in the Distribution, use the **Column Order** side of the page.

Grid Customization Help

Distribution Lines

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order		Sort Order	
Tab GL Chart (frozen)	  		  
Copy Down (frozen)			
Line (frozen)			
Merchandise Amt (frozen)			
Quantity (frozen)			
GL Unit	<input type="checkbox"/> Hidden		<input type="checkbox"/> Descending
Account	<input checked="" type="checkbox"/> Frozen		
Fund			
Program			
Department			
Cost Center			
Task			
FIPS			
Asset			







6. If any display with the word **(frozen)**, unfreeze them so you can move the fields around.
7. To remove the **(frozen)** status, click the first item listed as **(frozen)**. In this scenario, **Tab GL Chart**.
8. A check displays in the **Frozen** checkbox.
9. Click on the **Frozen** checkbox to remove the (frozen) from all items in the list.

Grid Customization Help

Distribution Lines

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order		Sort Order	
Tab GL Chart	  		  
Copy Down			
Line			
Merchandise Amt			
Quantity			
GL Unit	<input type="checkbox"/> Hidden		<input type="checkbox"/> Descending
Account	<input type="checkbox"/> Frozen		
Fund			
Program			
Department			
Cost Center			
Task			
FIPS			
Asset			

10. Now no columns are frozen.

Grid Customization
[Help](#)

Distribution Lines

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order		Sort Order	
Tab GL Chart	<input type="checkbox"/> Hidden <input type="checkbox"/> Frozen		<input type="checkbox"/> Descending
Copy Down			
Line			
Merchandise Amt			
Quantity			
GL Unit			
Account			
Fund			
Program			
Department			
Cost Center			
Task			
FIPS			
Asset			

- To change the order, click the field you want to move up or down. For this scenario, **Account** was selected.
- Click the up or down arrows to move the field to where you want it to display.

Grid Customization
[Help](#)

Distribution Lines

Personalize Column and Sort Order

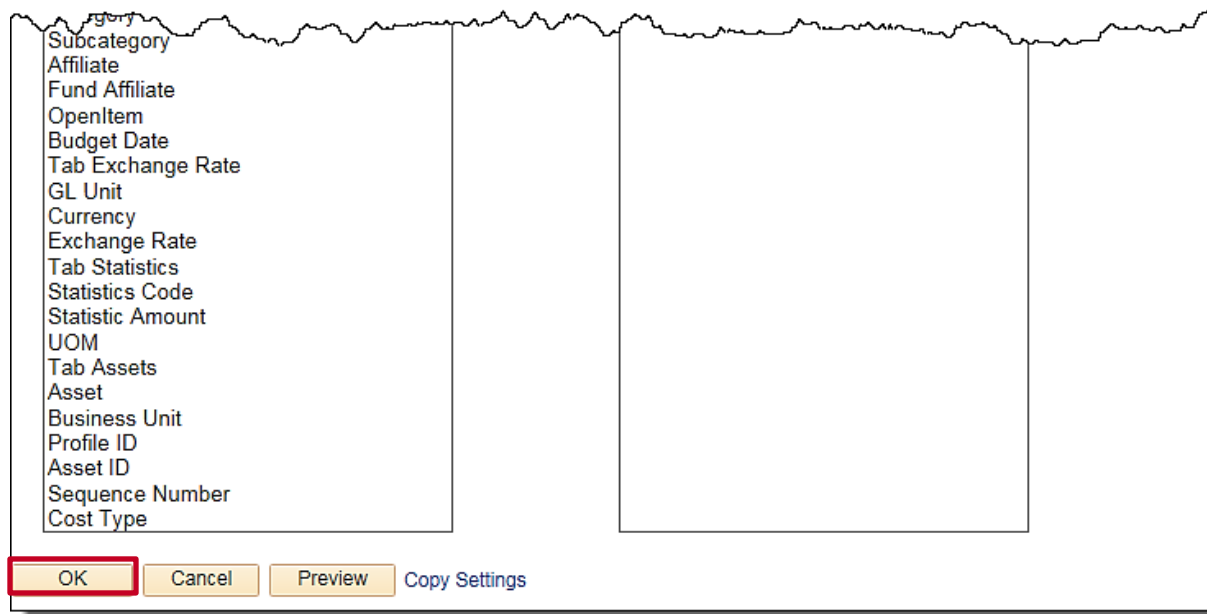
To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order		Sort Order	
Tab GL Chart	<input type="checkbox"/> Hidden <input type="checkbox"/> Frozen		<input type="checkbox"/> Descending
Copy Down			
Line			
Merchandise Amt			
Account			
Fund			
Quantity			
GL Unit			
Program			
Department			
Cost Center			
Task			
FIPS			
Asset			

- Continue this process until all fields are in the order you want.

SW AP312: Personalizing the Distribution Line – Invoice Information Page

14. Scroll to the bottom of the pop-up window.



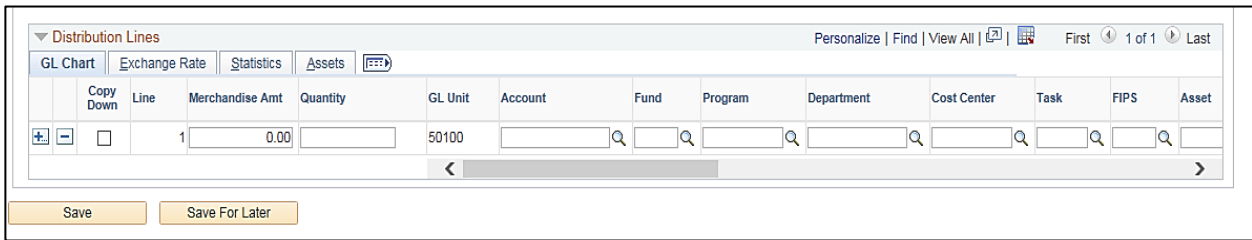
Subcategory
Affiliate
Fund Affiliate
OpenItem
Budget Date
Tab Exchange Rate
GL Unit
Currency
Exchange Rate
Tab Statistics
Statistics Code
Statistic Amount
UOM
Tab Assets
Asset
Business Unit
Profile ID
Asset ID
Sequence Number
Cost Type

OK Cancel Preview [Copy Settings](#)

15. You can:
- Click the **OK** button to accept the change and return to the Invoice Information page.
 - Click the **Cancel** button to cancel the change.
 - Click the **Preview** button to preview the change.
- For this scenario, **OK** is clicked.

SW AP312: Personalizing the Distribution Line – Invoice Information Page

Before

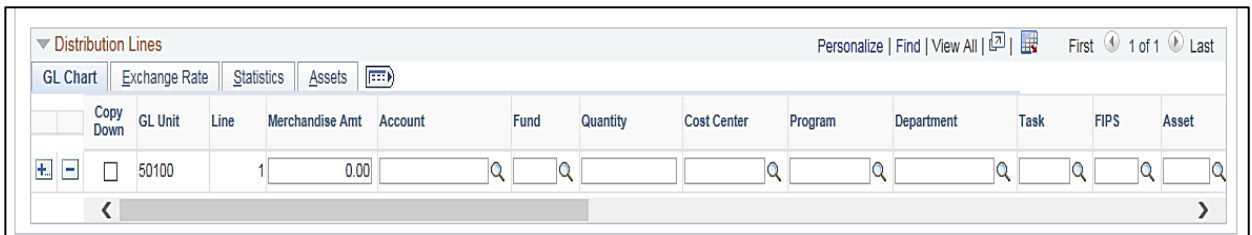


Personalize | Find | View All | First 1 of 1 Last

Copy Down	Line	Merchandise Amt	Quantity	GL Unit	Account	Fund	Program	Department	Cost Center	Task	FIPS	Asset
<input type="checkbox"/>	1	0.00		50100	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Save Save For Later

After



Personalize | Find | View All | First 1 of 1 Last

Copy Down	GL Unit	Line	Merchandise Amt	Account	Fund	Quantity	Cost Center	Program	Department	Task	FIPS	Asset
<input type="checkbox"/>	50100	1	0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

16. The fields in the **Distribution Lines** section now display in the order you specified.